Assessment Plans and Interlibrary Loan:
a round peg in a square box?

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UNIVERSITY OF DELAWARE. | Library

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Introduction to Assessment

Mapping out your plan

Assessment and Strategic Plans

Strategic Plan: The road map your institution/library uses to guide decision-making, projects and organizational progress.
- Priorities for organization
- Guiding communication for stakeholders

Assessment: Demonstrated proof of plan's success
- How do you **know** the plan is successful?
- How do you **show** the value and impact of the plan's success?

Strategic Initiatives and Goals

1. Fully align our resources and services to the colleges' educational and research missions.
- Align information literacy (IL) instruction, reference and research services, and information resources to the curriculum and research agendas of students, faculty, and staff of the colleges
- Provide data management planning (DMP), education, curation, and digital publication support for research projects
- Ensure that print, digital, and special collections meet users' research, teaching, and learning needs

2. Expand the universe of discoverable information and create new pathways to knowledge.
- Facilitate faculty and student scholarship and publication
- Enhance research, teaching, and learning

3. Empower confident, critical, and creative information users and producers.
- Create information literate learners
- Bolster faculty and student technological skills and experience
- Ensure that faculty and students discover primary sources and make cultural connections for use in research projects and their intellectual lives

4. Establish the Next Generation Library as the vital center for intellectual engagement and academic community building at the Claremont Colleges.
- Ensure that faculty, students, and staff benefit from the library's creating new and stronger connections between the academic communities of the colleges
- Guarantee that an active collection of browsable print resources is available to users
- Provide users with engaging, interactive, and creative spaces for research, teaching, learning, and study that are welcoming, accessible, resource-rich, and secure
- Enable users to discover and engage in a rich portfolio of library publications, exhibitions, programs, and events

5. Contribute substantially to faculty and student success and the distinction of the colleges.
- Further the colleges' faculty and student recruitment efforts
- Facilitate faculty and student success by enabling users to efficiently and quickly obtain the information resources they seek
- Foster greater student academic success through participation in library research services and programmatic initiatives
- Enhance the colleges' academic stature

6. Cultivate and manage information resources, services, physical and virtual spaces, and human resources within a sustainable financial model.
- Preserve information resources as a responsible steward of campus resources
- Expand opportunities for faculty and students to contribute to building the library's information resources
- Increase access to non-owned resources
- Engage in innovative and sustainable organizational development that will improve recruitment, retention, professional growth, inclusivity, and morale, while contributing to the profession

7. Partner with the colleges and the CUC to determine, attain, and sustain the funding required for this plan to succeed.
- Collaborating closely with CUC Business Affairs, determine library macro-budget proposals and activities that are aligned to this five-year plan
- Partner with the colleges to develop a new advancement capacity for the library that will further the strategic plan and directly benefit the consortium

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2.2 Enhance research, teaching, and learning

- Integrate POD workflows into Resource Sharing
- Enhance communications through resource sharing to connect students and faculty with other resources and librarians

3.1 Create information literate learners

- Provide quality statistics to librarians from resource sharing to help guide outreach to faculty
- Participate in providing contextual help through resource sharing shaped around the IL Framework and Habits of Mind

Goals to Actions

2.2 Enhance research, teaching, and learning

☑ Integrate POD workflows into Resource Sharing

☑ Enhance communications through resource sharing to connect students and faculty with other resources and librarians

- Did librarians see an increase in consultations?
- Were the resources shared utilized more that semester?

3.1 Create information literate learners

☑ Provide quality statistics to librarians from resource sharing to help guide outreach to faculty

☐ Participate in providing contextual help through resource sharing shaped around the IL Framework and Habits of Mind

- Where are users getting "stuck" when requesting items owned electronically?
- Are librarians working with those classes?

Action to Proof

Assessment plans for ILL departments

Considerations for assessing Interlibrary Loan departments or units.

Mila C. Su
SUNY Plattsburgh

RUSA STARS: 5 Things Every New Resource Sharing Librarian Should Know

Assessment

Whatever name you use: quality measurement, program evaluation, benchmarking – the purpose of assessment is to help you make decisions about your library's services. Some decisions may be: what new services should be developed, what services need improvement – or, what should you stop doing completely? Assessment can be used to discover whether the quality, speed, price or quantities of the services your library provides are similar to other libraries of your type and size – or not.

http://www.ala.org/rusa/sections/stars/5-things-every-new-resource-sharing-librarian-should-know#Assessment

Before you start

- What do you know about the "status" of your borrowing and lending areas?

- You might want to review all ILL activities in the past 3-10 years to see if there are patterns to identify as potential areas of assessment.

Ready to tackle an assessment plan?

- Begin by looking at your institution's mission, strategic plan, and main objectives/values.

- Then look at your library's mission, strategic plan, and main objectives/values.

- Opportunity to identify and list potential objectives, even if it seems a stretch that cross apply to interlibrary loan.

Keep in mind

- Assessment plans are long term plans usually 3-5 years.

- During that time different objectives/values are focused on each year of the cycle.

- This allows for flexibility

Outline of an assessment plan*

- Start with an overview of the purpose of your plan. (include mission statement of unit)

- Identify outcomes/goals. What outcomes will you be assessing? (needs to be measurable)

- When (timeline of data gathering, review, analysis, etc.)

- Who is responsible (for the data collection, review and analysis, reporting, etc.

*There are many ways an assessment plan can be structured.

Data, statistics and metrics, oh my!

- What assessment methods will you use?
- Common measurements include:
  - Fill rate – how often does your department fill requests from borrowing libraries?
  - Turn around time – how long do your patrons wait for a book or journal to be delivered? How long does it take your ILL department to respond to borrowing library requests?
  - Cost studies – how much does it cost your department to loan a returnable item? A photocopy?
  - User studies – who is using your ILL department? What academic group? Faculty? Graduate students vs. undergraduate? Is usage on the rise? Are patrons happy with your services?
  - What is being requested? What titles or types of materials are you being asked to borrow for your patrons? What titles or types of materials are you most frequently lending?
  - Consortial borrowing statistics

http://www.ala.org/rusa/sections/stars/5-things-every-new-resource-sharing-librarian-should-know#Assessment

Additional methods to consider: Case studies, Cohort studies, Comparative studies, Gap analysis

Data, statistics and metrics, oh my!

- Use Bloom's taxonomy to keep "action"
- Qualitative vs. Quantitative?
- If using Student Learning Outcomes (SLO), what "fits"?
- If using Performance Metrics, how do you link to library/institutional goals/objects?

Combining parts to make a new whole — **Create**

Judging the value of information or ideas — **Evaluate**

Breaking down information into component parts — **Analyze**

Applying the facts, rules, concepts, and ideas — **Apply**

Understanding what the facts mean — **Understand**

Recognizing and recalling facts — **Remember**

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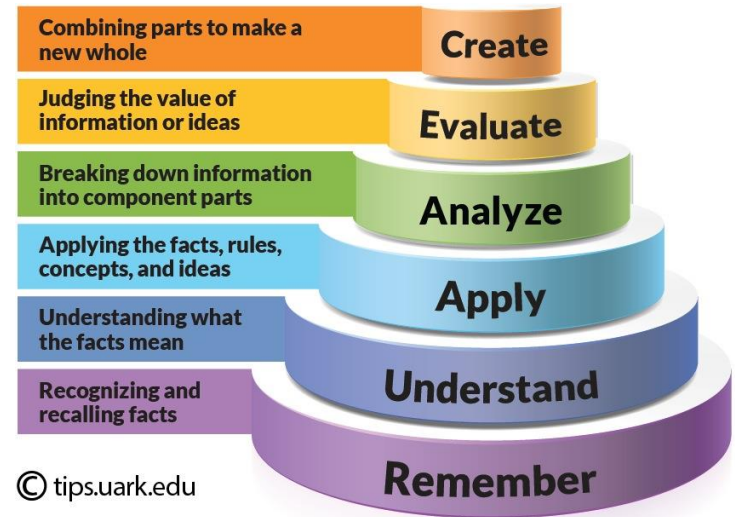
After the data…

Analysis

- **Who** is involved with the analysis?

- **What** are the results?

- **What** insight can you gain from the results?

- **What** is the context or relationship of the data you have collected?

After the data…

Results:
- What are the criteria:
  - to share successes
  - for Informed decision making
  - for collaboration with other departments; libraries
  - for follow through with future improvements

- Who will have access to the results and commentary?
- How will distribution be handled?
  - Internal (department, unit, dean, etc)
  - External (other ILL dept, consortia, accreditation body)

Undergraduates, Textbooks & the Quarter System @ Northwestern

Kurt Munson, Assistant Head, Access Services,
Northwestern University

Does ILL meet the students' expectations as a tool for them to acquire textbooks for their classes?

1. Identify a population of users who requested textbooks on ILL.

2. Survey them to find out if their expectations were met.

3. Compare what their responses to data in ILLiad

4. Identify gaps

5. Repeat the survey in subsequent quarters with different populations.

Does the survey have sufficient reliability? 10 people say the same thing.

Does it have validity? Does it actually answer our question and tell us what we want to know?

Contact the Identified Population

Help the Library do a Better Job

Kurt I Munson

Sent: Wed 10/22/2014 2:46 PM

To: Kurt I Munson (kmunson@northwestern.edu)

Hello,

Would you help us by filling out a brief 2-5 minute survey about using interlibrary loan to get textbooks? Our records indicate you requested at least one textbook using Interlibrary Loan (ILL) during the past school year. Textbooks can be difficult to get on ILL so we want to know how well we did, what your expectations were and how well this worked for you.

Any feedback you give will be recorded completely anonymously, and the survey itself is located here:
https://www.surveymonkey.com/s/GTC93S6

If you have any other comments or questions, please feel free to contact me directly.

Thank you for your time!

Best,

Kurt

Gather the Results

InterLibrary Loan Textbook Requests

1. 1. Why did you place a request for a textbook within the first few weeks of the quarter? Please rank the importance of each factor in your decision:

	Not Important	Somewhat Important	Important	Very Important
Item needed for coursework	○	○	○	○
Item unavailable at bookstore	○	○	○	○
Item required immediately	○	○	○	○
Item too expensive to purchase	○	○	○	○
Item only recommended for coursework	○	○	○	○
Previous successful experience(s) with ILL	○	○	○	○

Other (please specify)

2013 Winter

62% of the request were filled (All ILL is 87%)

56% for <u>Introduction to ….</u> 10 ed. textbooks

82% for other required readings

2014 Fall

64% of the request were filled (All ILL is 88%)

53% for <u>Introduction to ….</u> 10 ed. Textbooks

86% for other required readings

Outcomes I

Even if ILL is not the best way for students to acquire their textbooks, it works **well enough** for them that they continue to use it. It meets their expectations.

Recognizing how important this service is to undergraduates, we made the following changes to our processes:

• distribute a list of textbooks we cannot order to the service desks at the beginning of each quarter.

• take more latitude with editions when ordering.

• have a special cancellation email for textbooks.

Outcomes II

Use the data and the survey results to explain to:

Student Government that ILL cannot replace textbook purchasing by students

Other campus (and library) offices that ILL cannot replace textbook purchasing by students

All that libraries cannot solve the cost of textbooks/student success problem

Assessing Turnaround Time and User Satisfaction at the University of Delaware

Megan Gaffney
Coordinator, Interlibrary Loan and Document Delivery Services
University of Delaware Library

Goals and Questions

Follow up on concerns raised in LibQual+ survey in 2013, gauge general satisfaction level

Conducted over spring semester 2015

➔ What do our users think and expect?
➔ How slow is "slow"?

Survey Invitation

Responses

Questions 1 and 2: level of satisfaction with our service and reasons for their answer

Article DELivery Service: 89% very satisfied

ILL Articles: 89% very satisfied

ILL Loans: 59% very satisfied

Across all three services and 156 responses, only **one** response of "somewhat dissatisfied" and **one** response of "neutral."
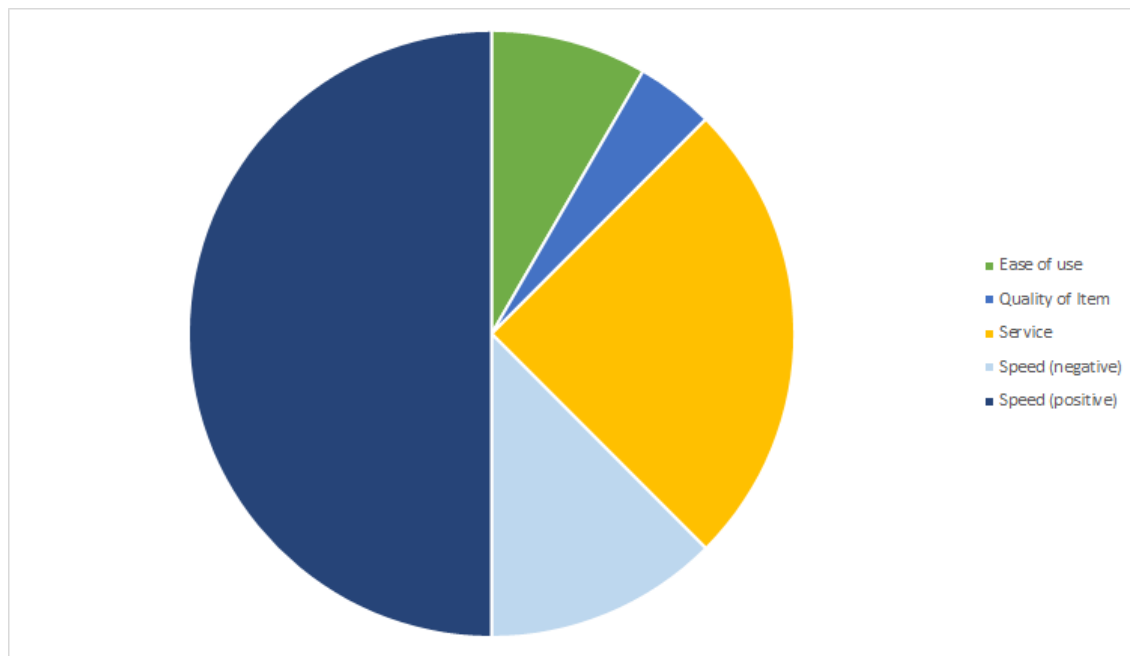
Responses

https://flic.kr/p/851a9a

112 out of 194 comments cited speed (positive) as reason for their level of satisfaction; 4 out of 194 cited speed (negative)

30 out of 194 comments cited quality (positive) as reason for their level of satisfaction; 4 out of 194 cited quality (negative)

Other comments talked about good service, time savings, value to the user, ease of use, and the fact that the service is free. There were no negative comments about service!
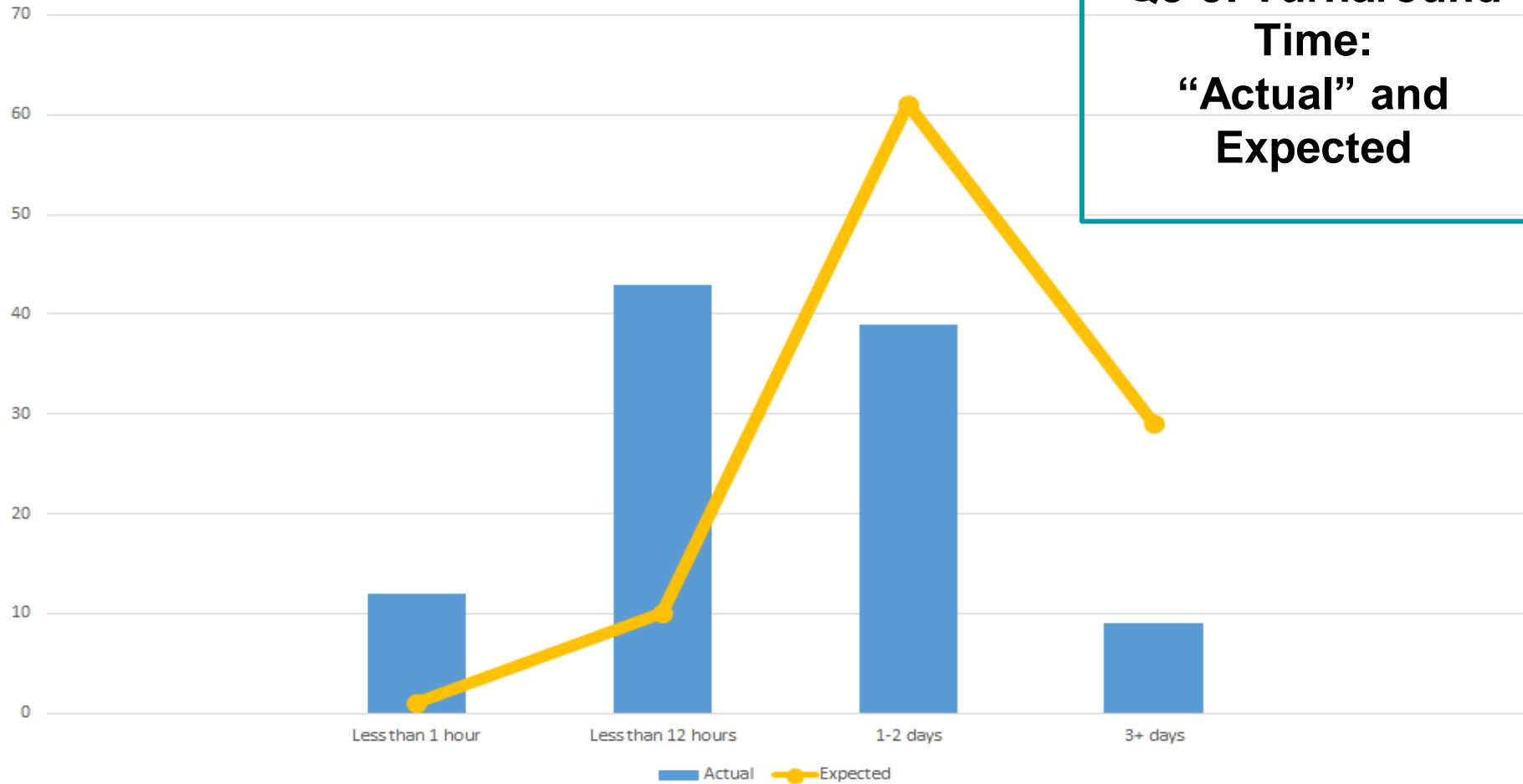
Responses

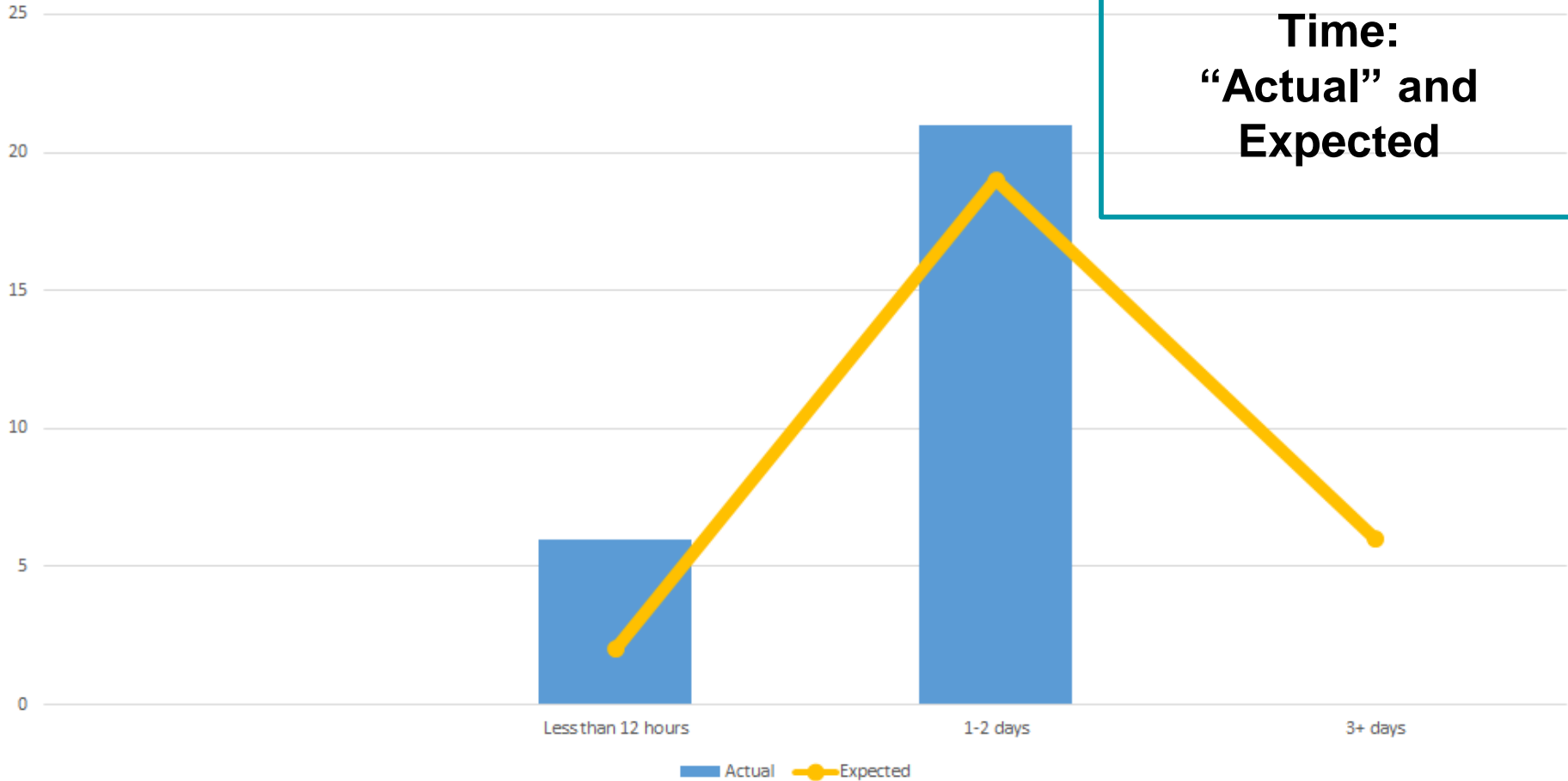What about the not-very-satisfied respondents?

ILL Articles

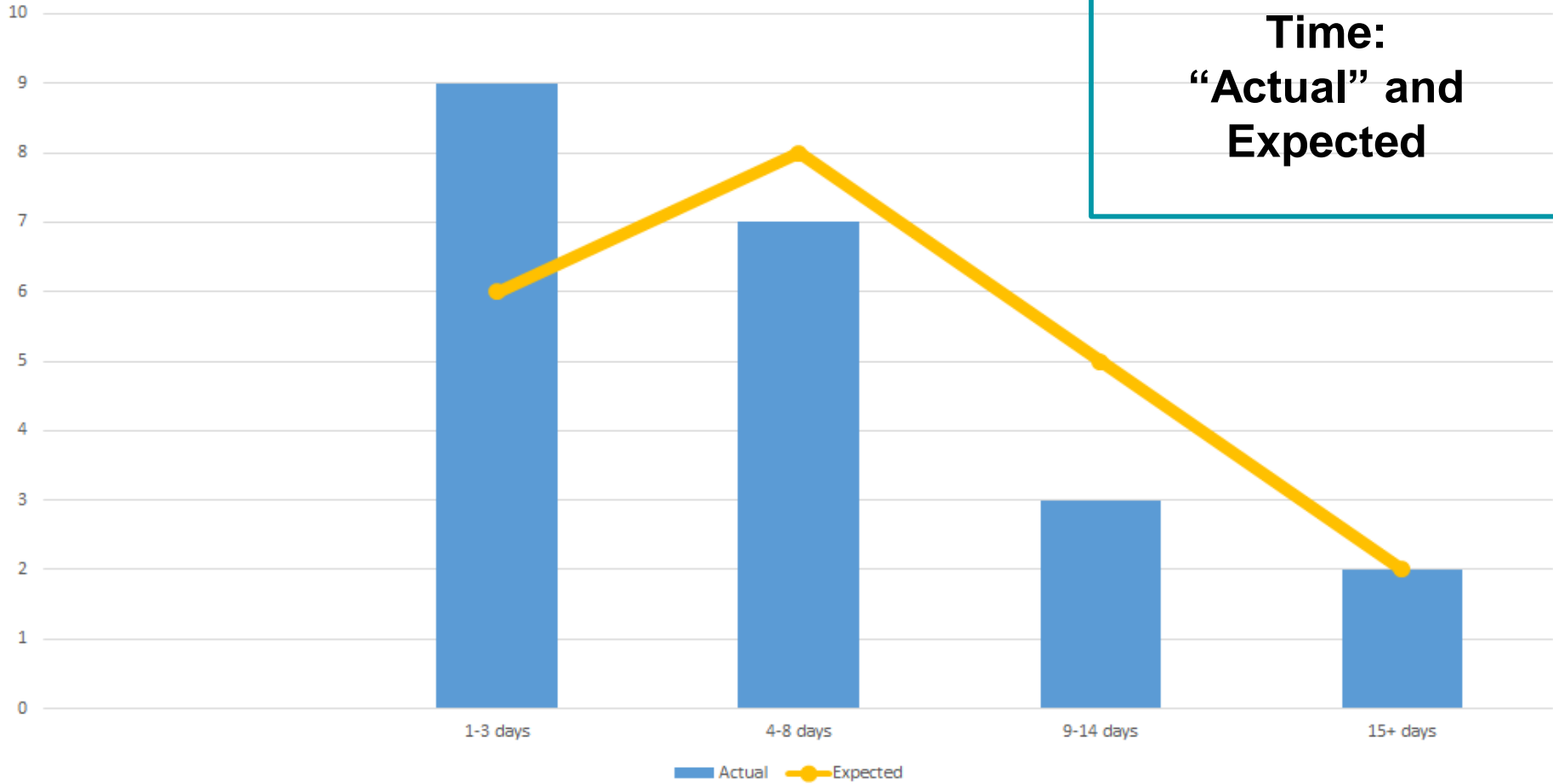**Q3-5: Turnaround Time:
"Actual" and Expected**

Legend: Actual, Expected

Categories: Less than 1 hour, Less than 12 hours, 1-2 days, 3+ days

Lessons Learned

- Generally exceeding users' expectations

- Confirm workflow and partnership success

- Later focus groups were a big surprise

- First ILL-specific assessment effort; some mistakes and lots of limitations with the method
    - Unique users?
    - Less than 2% of filled requests
    - Actual turnaround time may not match user's perceived turnaround time (...but does that matter?)

2014 Strategic Plan

Expand collection and information access;
Improve access infrastructure

- ○ "These requests are **critical to my research** and my completing my dissertation. **Without this service I would have a very difficult time accessing** articles and book chapters. Thank you so much!"
- ○ "...the ILL staff are very pleasant to work with, and will **offer a variety of helpful hints** when opportunities arise."
- ○ "**Honestly surprised that ILL was able to find this source** - not a lot of reference to it online so I thought it was **fairly obscure**."
- ○ "I am impressed with the speed with which **even the most arcane references are located**."
- ○ "I've asked for a lot of material… in the cases in which UD had electronic holdings that I had not found, **gave me a link to them**. Much appreciated."

2014 Strategic Plan

Continue and strengthen existing partnerships and collaborative memberships

○ "It is extremely helpful to have a Library and within it ILL that allows us to have **access to publications from all over the world**. Inter Library Loan at UD **exemplifies the word global and connected**. Thank you!"

○ "The staff and the service itself is EXCELLENT! I am a very regular user, **in need of materials from both the U.S. and Europe, and rarely is any request unsuccessful**."

○ "Tenacity; you keep trying to find some library to loan the item until all alternatives are exhausted. If you can't find a lending library then **you suggest other ways to obtain the material**."

New strategic plan coming soon!

- Recent focus groups showed high level of satisfaction with ILL: what's next?

Assessing Impact of Document Delivery @ University of Washington Libraries

Heidi Nance
Head, ILL & Document
Delivery Services

https://flic.kr/p/9K7J7H
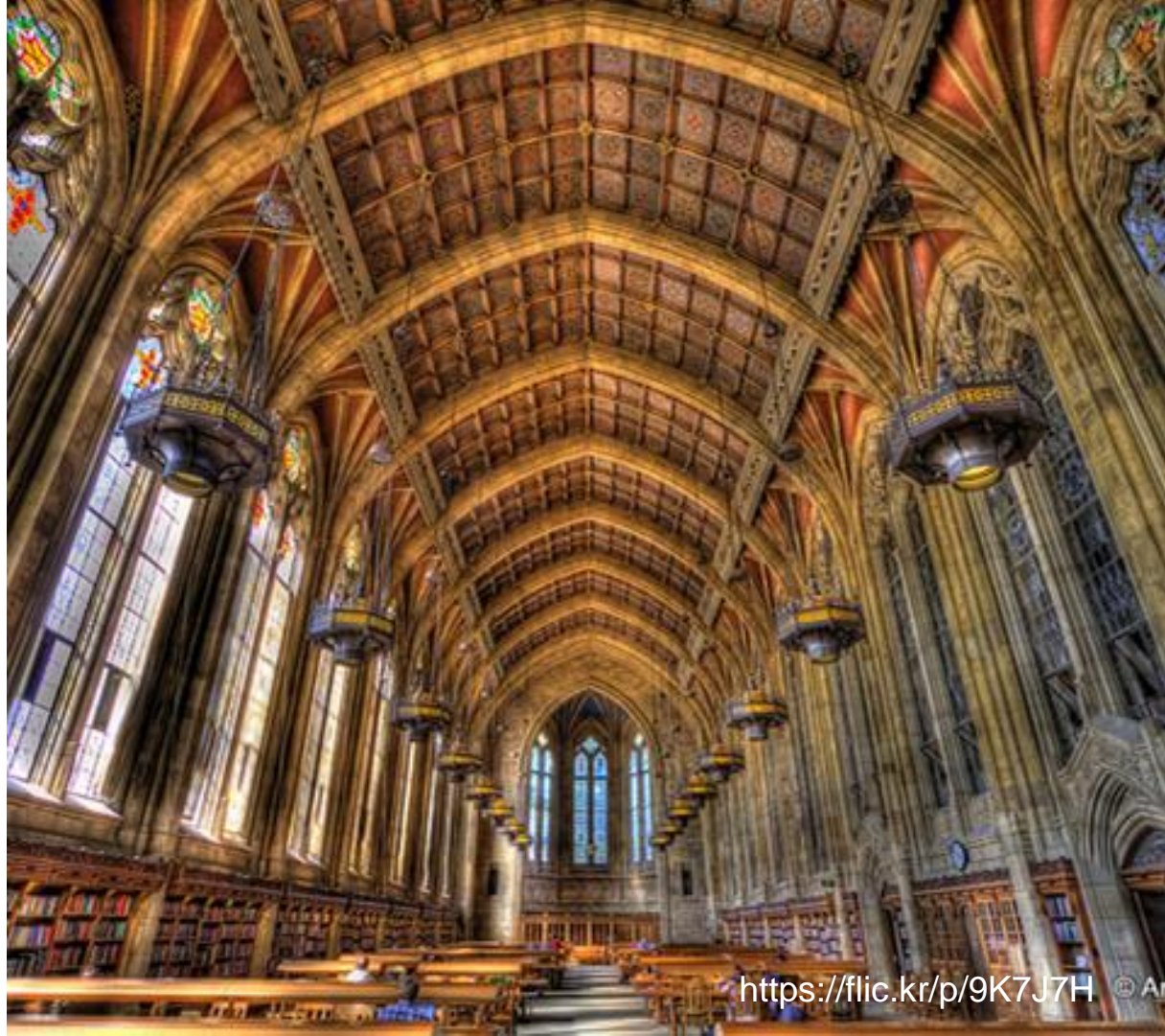
Background

In **2007,** the Libraries Triennial Survey showed that 70% of graduate students requested article scanning as a future service enhancement.
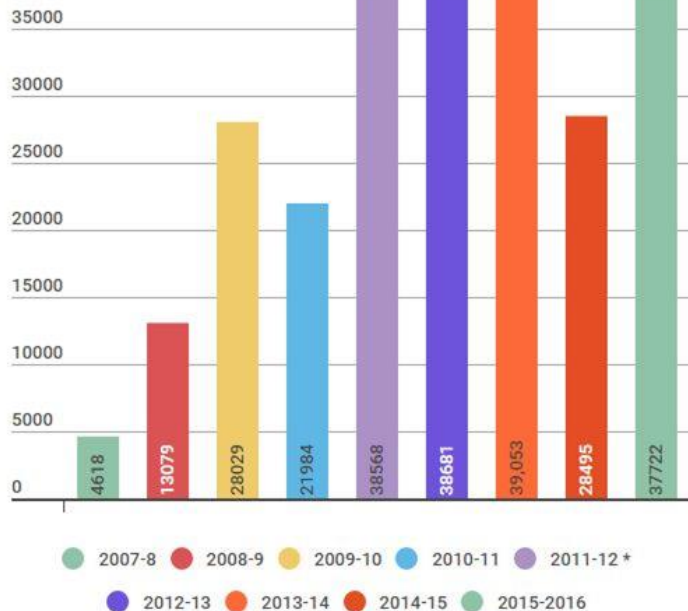
In **2009**, the Libraries merged two NVTGC's - our Main ILL department and our Health Sciences ILL department. At this point we made scanning print journal articles free for all UW students, faculty, and staff (no book chapters).

General Statistics

We have scanned > **232,532** print journal articles in >**7** years. That's an average of **639** per week.

"ILL/Document delivery is amazing thanks for fetching and scanning my obscure article PDFs. Honestly if the whole physical library went away and we just had that PDF scan service life would be ok. (Although I love physical books)." - Graduate, 2016 Triennial Survey

Article Scanning Service

Values: 4618, 13079, 28029, 21984, 38568, 38681, 39,053, 28495, 37722

Legend: 2007-8, 2008-9, 2009-10, 2010-11, 2011-12 *, 2012-13, 2013-14, 2014-15, 2015-2016

Share — infogr.am

Project 1

Assessing Impact to Faculty Research

2011

In Fall 2011, we wanted to assess both **user satisfaction** and the **impact to the user experience,** and just to generally check in on the **success of the service**.

We asked…

"Estimate how much time was saved by having the Libraries pull, scan, and send the article(s) directly to you."

Less than 15 minutes

15-45 minutes

More than 45 minutes

They answered …

"Estimate how much time was saved by having the Libraries pull, scan, and send the article(s) directly to you."

Less than 15 minutes - **1.91%**

15-45 minutes - **17.83%**

More than 45 minutes - **80.25%**

They answered …

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15-45 minutes - **17.83%**

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Then we determined the average faculty hourly salary to determine what 45 minutes of faculty time was worth. We multiplied that by the number of scans for faculty … and determined we'd **saved the University almost $500,000 of faculty time.**

They answered …

That's Value!

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Project 2

Assessing Impact to Student Learning and Success

2016

In Fall 2016, we wanted to assess the impact of this service on the student experience in particular (ug, grad) to include in our request for Student Technology Fee funds for new scanners.

We asked…

"What would you have done if this service did not exist? (select all that apply)."

I would visit the library in person to read or scan this print article.

I would not have used this print article but would have looked for another article with immediate, online access.

Other (please specify)

They answered ...

"What would you have done if this service did not exist? (select all that apply)."

I would visit the library in person to read or scan this print article. - **21%**

I would not have used this print article but would have looked for another article with immediate, online access. - **69%**

Other (please specify) - **9%**

They answered ...

"What would you have done if this service did not exist? (select all that apply)."

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I would not have used this print article but would have looked for another article with immediate, online access. - **69%**

Other (please specify) - **9%**

These survey results demonstrate that this service has a significant impact on **students' academic success** and facilitates access to scholarly content that would otherwise go unused, **potentially even changing the outcome of their research.**

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WORKSHOP